

Client Track: Agency Administrator 101

TRAINING OVERVIEW

Client Track Overview

Users & Partnerships

How to Login

System Setup for Administrators

Reporting Tools

View/Update Staff Information

WHAT IS CLIENT TRACK?

- In 2009, Client Track was purchased from Data Systems International (DSI) by IHCDa to serve as the CSBG data collection system
- Client Track is the statewide database that will be used to track clients served by each community action agency (CAA)
- The system will produce an unduplicated count of clients served across each agency's programs
- The system will produce each agency's annual CSBG IS report
- The system can be used a comprehensive reporting tool to not only gauge the impact of CSBG dollars, but also other federal and non-federal funding streams

WHO WILL USE CLIENT TRACK?

Client Track has three levels of users.

State Users

- These users include the IHEDA Program Managers, Specialists, Monitors, and Contractors (Roeing)
- They will have access to all of the data and reporting in the system

Agency Administrators

- They will oversee the agency implementation of the system
- They will oversee daily usage of the system after implementation
- They will conducting all state-required and agency-required reporting
- They will have access to all agency data and reporting, including the front line staff, but no state level access

Agency Front Line Staff

- They will encounter all information obtained during the client eligibility review
- They will serve as data entry specialists
- They will access to client intake data only

DUAL USERS

Agencies and Community Partnerships

- Some agencies have created partnerships with local United Way agencies or other services providers
- These partnerships collect data toward completion of the CSBG IS report
- The partners have paid or have been given access to Client Track
- Agencies with these partnerships will have dual users
- These dual users will have the following access:
 - One username and password
 - Access to data from both agencies in the partnership

CSBG and HMIS

- Client Track is also used to collect data the Community Services Block Grant and Homeless Management Information System (HMIS)
- As a result, agencies that have provide services under both programs will have dual users
- Dual users will have the following access:
 - One username and password
 - Access to both HMIS and CSBG data

HOW TO CHOOSE YOUR AGENCY ADMINISTRATORS?

Agency Administrators should be users that possess the following skill sets:

- be familiar with your agency's reporting requirements for various grants, especially CSBG.
- participate, in some capacity, with the CSBG IS reporting process
- should have familiarity with CSBG, ROMA Goals, and NPIs
- should be familiar with your agency's community partners, needs assessments, and current client intake processes across various programs
- Should have some familiarity with the agency's IT infrastructure, as it pertains to data collection and reporting

LOGGING IN ONLINE

To log into Client Track, the user should visit <http://ihcdaonline.com> and click on Client Track.

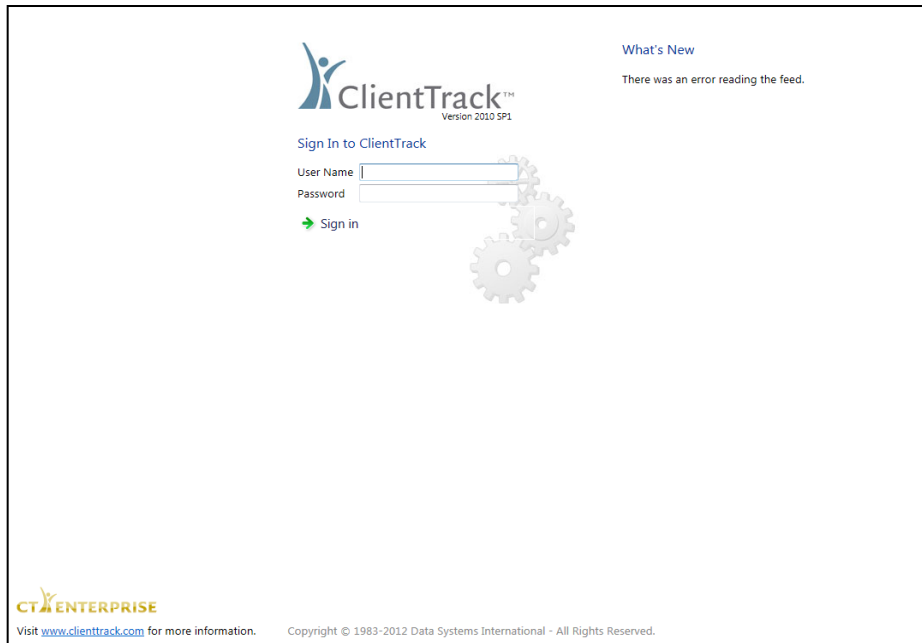


LOGGING IN ONLINE

Then, the user will be prompted to log into the Client Track Database.

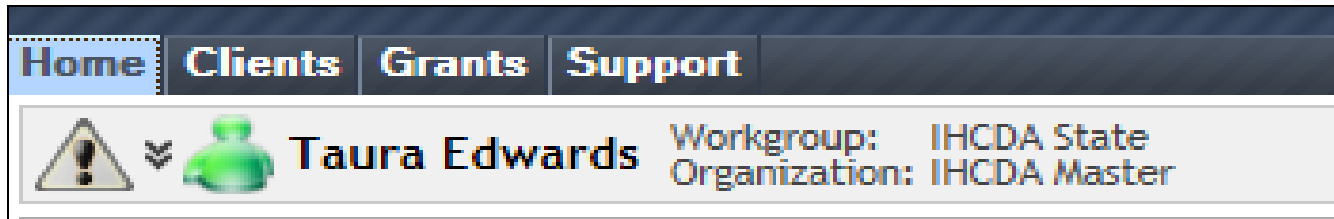
Each user is given a unique username and password.

If a user does not have this information, then that user should contact the agency's administrator.



The image shows a screenshot of the ClientTrack login interface. At the top left is the ClientTrack logo with the text "ClientTrack™" and "Version 2010 SP1" below it. To the right of the logo is a "What's New" section with the text "There was an error reading the feed." Below the logo is a "Sign In to ClientTrack" section. This section contains two input fields: "User Name" and "Password". Below these fields is a green arrow icon followed by the text "Sign in". To the right of the input fields are three interlocking gears. At the bottom left of the interface is the "CT ENTERPRISE" logo and the text "Visit www.clienttrack.com for more information." At the bottom right is the copyright notice "Copyright © 1983-2012 Data Systems International - All Rights Reserved."

TOOLBAR ON MY CLIENT TRACK



Home

If a user has click on My Client Track or logged in for the first time, HOME is the user's home page.

Clients

This tab allows the user to complete the CSBG Intake Workflow or update a client's information.

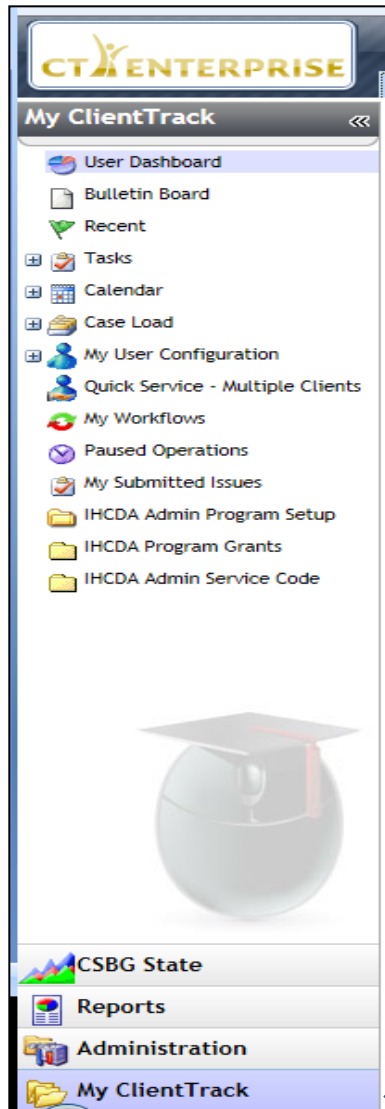
Grants

This tab allows the user to review any CSBG grant and program information. It is only used by administrators.

Workgroup: Identifies the user's access to database (User, Administrator, or State)

Organization: Identifies the organization that the user is linked to

CLIENT TRACK SETUP



My Client Track

Once a user logs in, My Client Track is that user's homepage.

If the user is in another section of the system, the user can return to the homepage by clicking on My Client Track

My Client Track can be used to track each staff person's:

- Tasks, appointments, and follow-ups
- Post messages and notes about client's accounts
- Caseloads and workflows, or teams if the user is a supervisor
- Update user information

Here is where reports are run and submitted.

Only agency administrators will have access to this link.

My Client Track is the Home Page once all users log in.

STEP: VERIFYING YOUR PROGRAM SETUP

All agency administrators should verify that their programs, grants, and services have been set up properly.

To do so, they will need to review information under the following tabs:

IHCDA Admin Program Setup

IHCDA Program Grants

IHCDA Admin Service Codes

IHCDA ADMIN PROGRAM SETUP

- Go to IHCDA Admin Program Setup under My Client Track.
- Agency administrators will use this tab to verify that the agency's Programs, ROMA Types, and NPIs (National Performance Indicators) are properly linked.

Welcome Taura Edwards (Training)

Settings Help Sign Out CT2010

Home Clients Grants Support

My ClientTrack

Taura Edwards Workgroup: IHCDA State Organization: IHCDA Master

Program Setup for Community Action

The list below displays the programs in the system. To add a new program, click the **Add New** button. To edit an existing program, click the **Edit** icon next to the desired program.

Program:

126 records found.

Program	ROMA Type	National Performance Indicators
Advocate Center		
Advocate Center - Non-Network Program		
Aging & In-Home Services		
AIDS Ministries - TH Facilities (TH-R2a-71)		
AIDS Resource Group - HOPWA LTRA (SSO-R12-82)		
AIDS Resource Group - HOPWA STRA (SSO-R12-82)		
American Red Cross SJC		
Aurora - Shelter Plus Care Vouchers (SSO-R12-82)		
Brother's Keeper Gary - Shelter (ES-R1a-45)		
Case Coordination		
Client Emergency	Emergency Services	6.20
CMHC - Center Street Non-HUD (PH-R13-78)		
CMHC - Center Street Permanent SHP (PH-R13-78)		
CMHC - Ludlow Apts Non-HUD (PH-R13-15)		
CMHC - Ludlow Apts. (PH-R13-15)		
CMHC - Ludlow Transitional (TH-R13-69)		
Community Center Block Grant (CCBG)	Self-Sufficiency	1.10, 1.20, 1.30

CSBG State Reports Administration My ClientTrack

Search Cancel

- If this information is incorrect, the administrator would contact IHCDA to have the information updated.

IHCDA PROGRAM GRANTS

- Go to IHCDA Program Grants under My Client Track.
- Agency administrators will use this tab to verify that the agency's Programs and Grants are properly linked.

Welcome: Taura Edwards (Training) Settings Help Sign Out CT2010

Home Clients Grants Support

Taura Edwards Workgroup: IHCDA State Organization: IHCDA Master

IHCDA Grants by Prog

Listed below are the Programs and their funding source

Program Name:

128 records found.

Program Name	Grant
Community Services Block Grant (CSBG)	CSBG - Bridges Out of Poverty
Emergency Assistance	Community Services Block Grant
Community Services Block Grant (CSBG)	Community Services Block Grant
Family Services	Community Services Block Grant
HMIS-Program	Test HMIS Grant
HMIS-Program2	Test HMIS Grant2
HPRP-Program	Test HPRP Grant
HPRP-Program2	Test HPRP Grant2
HPRP South Bend	HPRP South Bend
HSI - Transitional (SSO-R11-03)	SHP SSO Supportive Services On
Energy Assistance Program	LIHEAP-2010
Energy Assistance Program	LIHEAP-2011
Making Strides	Community Awareness
Healthy Families	
Housing Management	
IHCDA HOME Rehab-Apartments	
Family Preservation Child Welfare	
Girls Circle/Boys Council	
Perry Co Tobacco Prevention/Cessation	
First Baptist Church - Warming Shelter (ES-R1a-45)	
Point in Time R09 Unsheltered Count	
Point in Time R10 Unsheltered Count	
Point in Time R11 Unsheltered Count	
Point in Time R12 Unsheltered Count	
Point in Time R13 Unsheltered Count	
Brother's Keeper Gary - Shelter (ES-R1a-45)	
Point in Time R03 Unsheltered Count	
Point in Time R04 Unsheltered Count	

Search Cancel

- If this information is incorrect, the administrator would contact IHCDA to have the information updated.

IHCDA ADMIN SERVICE CODE

- The Admin Service Code tab links the following information for services
 - The Service Name
 - Organization ID
 - Service Group
 - Identifies if it is a Direct Service or Referral Service
 - Identifies its CSBG Service and HMIS Service Categories

Service Codes

This is a list of all service codes. To add a service code, click the Add New button. To edit an existing service, click the Edit icon next to the service you wish to view.

Service:

Service Group:

Direct Service:

Referral Service:

132 records found.

Service	Org ID	Service Group	Direct Service	Referral Service	CSBG Service Category	HMIS Service Category
12-Step Group	IHC		Yes	No		Other
Addictions	IHC	Counseling/Support	Yes	No		Other
Adult Education	IHC	VIA Training	Yes	No	Education	
After School	IHC		Yes	No		
AIDS Treatment	IHC	HIV/AIDS-Related Services	Yes	No	Health	HIV/AIDS-related services
Alcohol or Drug Abuse services	IHC	IHCDA-HMIS HMIS Service	Yes	No		Substance abuse services
Assertiveness / Self Advocacy	IHC	Counseling/Support	Yes	No		Other
breast cancer education	IHC		Yes	Yes	Education	
Bus Pass	IHC	Transportation	Yes	No	Self Sufficiency	Transportation
Bus Tokens	IHC	Transportation	Yes	No	Self Sufficiency	
CAN 50/50	IHC		Yes	No		
Case Management	IHC	IHCDA-HMIS HPRP Service	Yes	No		
Case Management	IHC	Case Management	Yes	No	Education	Case/care management
Case/Care Management	IHC	IHCDA-HMIS HMIS Service	Yes	No		Case/care management
Check-In	IHC	Housing	Yes	No		

WHAT IS A SERVICE GROUP

Service:

Service Group: **-- SELECT --**

Direct Service: **-- SELECT --**

Referral Service:

Org ID ▲	Service Gr	Service ▲
IHC		Assessments
IHC	Counseling	Basic Needs
IHC	WIA Training	Case Management
IHC		Childcare
IHC		Counseling/Support
IHC		Education
IHC		Employment
IHC		Financial
IHC		Health/Medical
IHC	HIV/AIDS-R	HIV/AIDS-Related Services
IHC		Housing
IHC		IHCDA-HMIS HMIS Service
IHC		IHCDA-HMIS HPRP Service
IHC	IHCDA-HMIS	Legal
IHC		Life Skills
IHC	Counseling	Mental Health/Counseling
IHC		Prenatal Care
IHC		Prevention/Outreach
IHC	Transporta	Substance Abuse
IHC	Transporta	Transportation
IHC		Utilities
IHC		WIA Core
IHC		WIA Training

- Service Group provides a way to categorize the different types of services offered
- There are 23 Service Groups in Client Track
- These services are used by CSBG and HMIS
- These groups have been identified based on service categories currently offered by community action agencies nationally
- To add a new service group, click on Add New in the upper right corner of the page

CLIENT INTAKE

Once the agency has confirmed that these data points are set up properly, agencies can begin the client intake process.

Please note that clients are entered in the system three ways:

RIAA/IWAP integration that takes place nightly

HMIS Data Entry

CSBG Intake Forms

Once the clients are entered, then agency administrators can begin running reports.

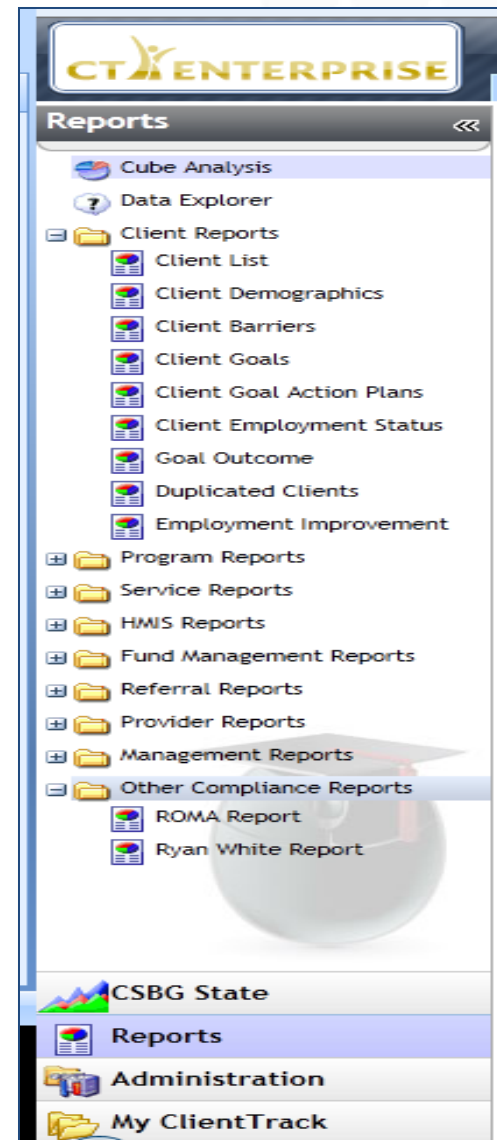
CLIENT TRACKING'S REPORTING TOOLS

- The most impressive feature of the database is its reporting capabilities.
- This system allows agency administrators to pull all types of data across programs, grants, services, demographics, and other useful information and analyze the agency's operations.
- This system offers nine reporting categories.
- These categories are:

Client	Referral
Program Reports	Provider
Service Reports	Management
HMIS Reports	Compliance Reports
Fund Management	
- Ultimately, the data will be used to complete that annual CSBG Information System (IS) Report that is submitted to NASCSP

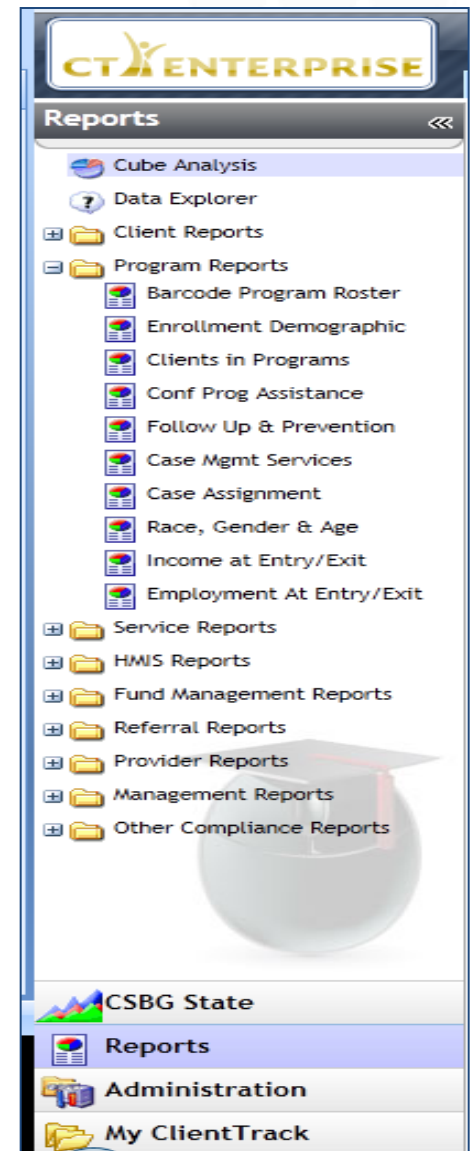
CLIENT REPORTS

- Client List and Demographics Reports-** based on client demographic information such as age, race, ethnicity, gender, and location
- Client Barriers-** identifies client barriers by program and demographics
- Client Goals, Goal Action Plans, and Goal Outcomes-** queries for goals based on programs, goal groups, goal types, and users
- Client Employment Status-** queries the clients' employment status
- Duplicated Clients-** queries for duplicated clients based on name, DOB, zip code, SSN and gender
- Employment Improvement-** queries for employment improvement by clients based on their organization, grants, and programs identified in the intake process



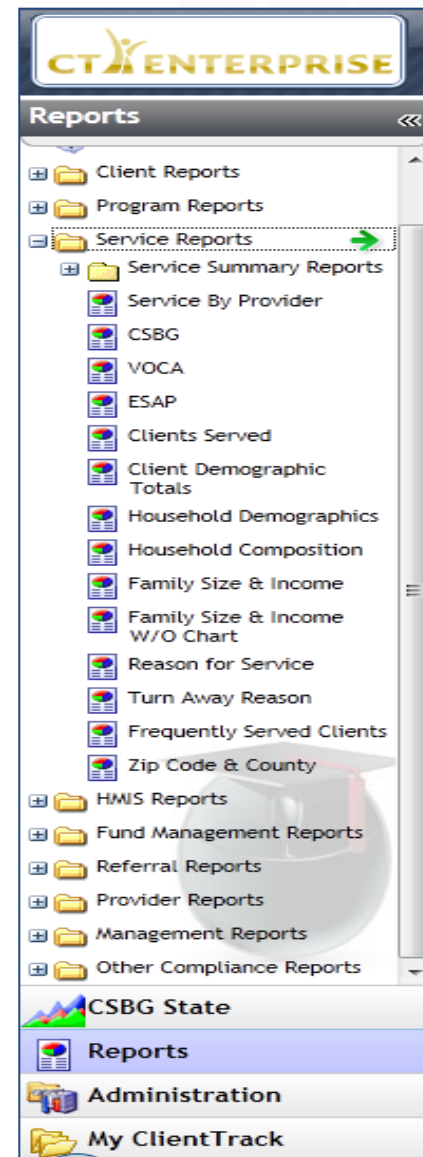
PROGRAM REPORTS

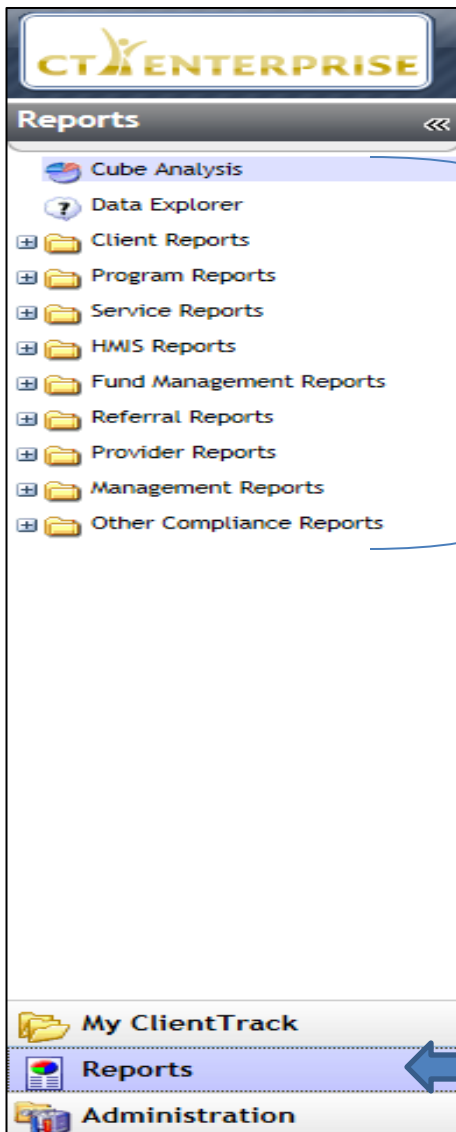
- Enrollment Demographic and Race, Age & Gender-** identifies clients in each program by the demographics listed during enrollment
- Clients in Programs-** clients enrolled in each program
- Confidential Program Assistance-** clients receiving confidential program assistance
- Follow up and Prevention-** allows the agency to query clients for follow up based on their programs and services
- Case Management Services and Case Assignment-** identifies clients enrolled in programs by case manager
- Income at Entry/Exit and Employment at Entry/Exit-** allows the case managers to evaluate the clients' income and employment at entrance and exit



SERVICE REPORTS

- **Services by Provider**- Query services by program, provider, and/or grant
- **CSBG**- This is Section G of the IS report
- **Clients Served & Demographic Totals**- Details clients served and their demographics
- **Household Information**-Query various types of household information
- **Family Size & Income**-Query various types of family size and income information
- **Turn Away**-Query the clients who were turned away
- **Zip Code & County**- Query clients/services by geographic location





HOW TO RUN A REPORT

Step 2: The menu will change to the list of reports

INSTRUCTIONS

- **Step 1:** Click on Reports on the bottom left side of the screen
- **Step 2:** The menu above it will change and list the report categories available
 - *Note: the dashboard will not change until you click on a report*
- **Step 3:** Choose a report

Warning: Reports will require you to disable your pop up blocker

HOW TO RUN A REPORT

Hide Charts: ☐

s for the report

Predefined Date Range:

Enrollments between: * and

Filtered by program enroll date fall in the report date range. Select Exited to filtered by the program exit date. S

Report Type: *

Which you want to run the report, or leave this field blank to run the report for all organizations. NOTE: The list v

Organization: *

- Area Five
- Area Four
- Community & Family Services, Inc
- Community Action of East Central Indiana
- Community Action of Greater Indianapolis
- Community Action of Northeast Indiana
- Community Action of Southern Indiana

g to your selected organizations. Select program enrollments you choose to view for this report. Leave this se

an enrollment but it is not tied to a program, select "No program on enrollment"

Program:

- No Program On Enrollment
- Advocate Center
- Advocate Center - Non-Network Program
- Aging & In-Home Services
- American Red Cross SJC
- BEED
- Care Coordination

or leave this field blank to run the report for all funding sources. Funds available for selection belong to the org

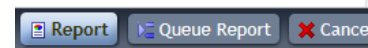
Funds:

- LIHEAP-2010
- LIHEAP-2011
- LIHEAP-2012
- Private Foundation
- Weatherization

available organizations. Select users you choose to view for this report. Leave this section "unselected" if yo

- **Step 4: Choose your report parameters**
 - **A) Date Range**
 - Predefined (ex: current month or last year)
 - Enrollments Between (ex: 6/1/2012 to 12/31/2012)
 - **B) Organization- Agency's Name**
 - **C) Program(s)- Programs that you wish to research**
 - **D) Fund(s)- Grants funding the programs**

- **Step 5: Click on Report in the bottom right corner**

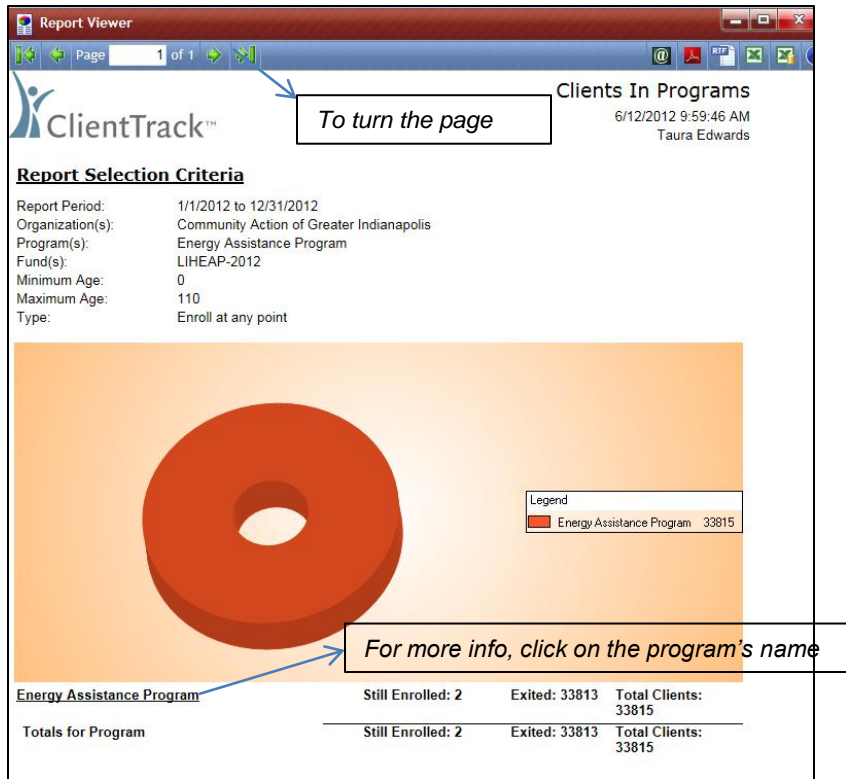


Notes to remember:

- Every report will have basic parameters to choose from
- Any place that has a red asterisk is a required field and must choose data
- Any field with a green check mark means you can choose multiple items

VIEWING THE REPORT

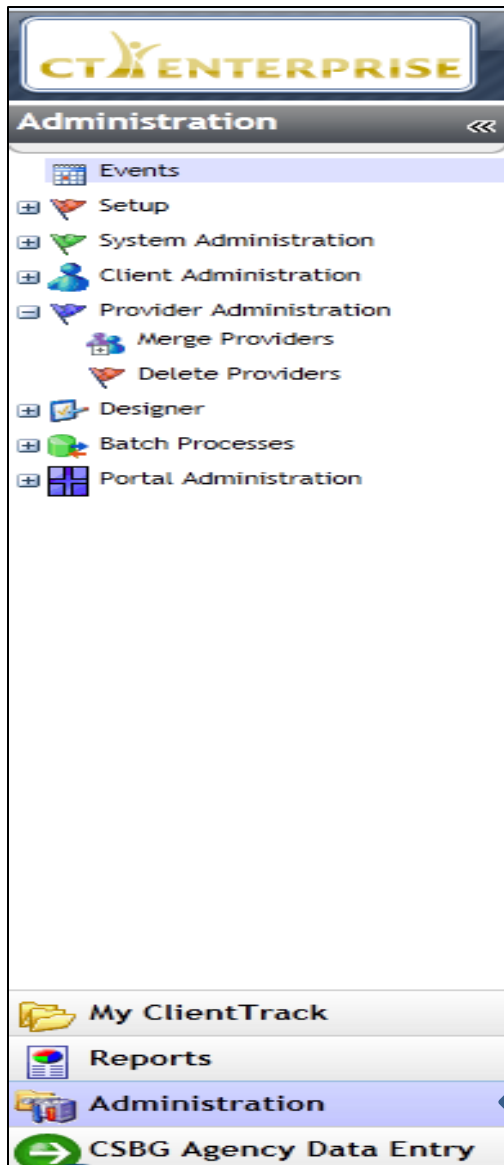
- The completed report will pop up in a screen called “Report Viewer”
- The report will detail all of the information you entered in Step 4
- Most reports have a graph or pie chart to provide a visual to your data query



Important Things to Remember

- 1) If the report has multiple pages, click on the green arrows in the top left corner to change the page
- 2) If the program has additional information, click on the program's name at the bottom and a new report will pop up

OTHER DUTIES AS AN ADMINISTRATOR



As an administrator, you have access to other important information in the system.

Go to **Administration** under the main menu. (bottom left corner)

Under Administration, you can:

- Change your staff's password
- View your program/grant/service setup
- Add/edit case note templates
- Add/edit other important information

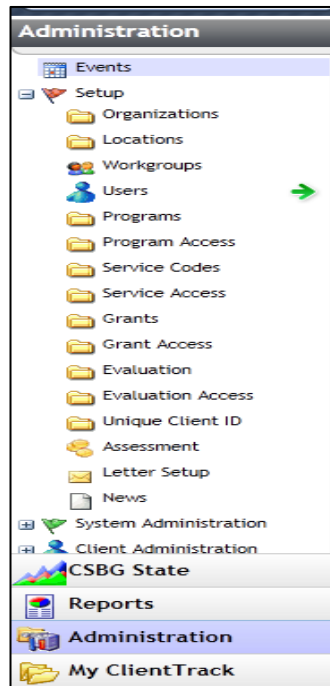
This training is an overview of the system's capabilities. You will need to explore all of the functionalities in the system on your own.

Click here for Administration

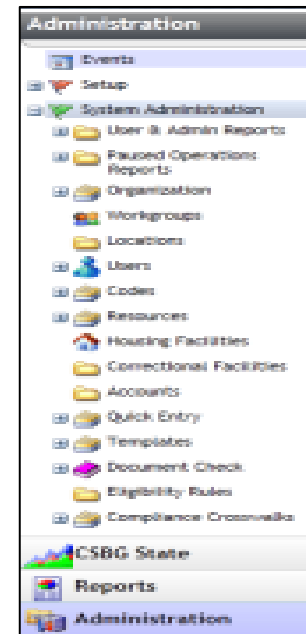
FINDING STAFF INFORMATION

You can access staff information in two places.

Option 1: Under Setup- Users



Option 2: Under System Administration- Users



FINDING STAFF INFORMATION

- Click on the Blue Users Icon.
- A search screen will appear.
- You can search by User Name, User Login, Organization, or Status (active/inactive)
- Click on Search in the bottom right corner

The screenshot shows the CT ENTERPRISE system interface. The top header displays the user's name, Taura Edwards, and their workgroup and organization. The left navigation menu includes options like Events, Setup, System Administration, and Users. The main content area is titled 'Users' and contains a search form with fields for User Name, User Login, Organization, and Status. Below the search form, a table lists the search results. The table has columns for User Name, User Login, Organization, Status, User Level, User ID, Created, Last Login, and Disabled. The search results show one record for Taura Edwards.

Search Options

User Name: Taura
User Login:
Organization:
Status: -- SELECT --

1 record found.

User Name	User Login	Organization	Status	User Level	User ID	Created	Last Login	Disabled
Taura Edwards	taedwards	Community Action of Greater Indianapolis	Active	1	AA7	02/28/2011	06/12/2012 2:03PM	

Your query will retrieve: User Name (staff person), User Login (login ID), Organization (your agency's name), status, last login, and date created

UPDATING STAFF INFORMATION

- Click on the blue dot next to the User Name
- A drop menu will appear (Edit, Change Password, User Login History, Delete)

Welcome Taura Edwards

Settings Help Sign Out CT2010

Home Clients Grants Support

Taura Edwards Workgroup: IHCDA State
Organization: Community Action of Greater Indianapolis

Users

Below is a list of all active users in the system. To add a new user, click Add User or Quick Add User. Action Gear Options: To edit a user, click Edit. To change a user's password, click Change Password. To assign a user to multiple workgroups, click Choose Workgroups. To assign a user to multiple organizations, click Choose Organizations. To view a user's history of login dates and times, click User Login History.

Quick Add User Add User

User Name: Taura
User Login:
Organization:
Status: -- SELECT --

1 record found.

User Name ▲	User Login ▲	Organization ▲	Status ▲	User Level ▲	User ID ▲	Created ▲	Last Login ▲	Disabled ▲
Taura Edwards	taedwards	Community Action of Greater Indianapolis	Active	1	AA7	02/28/2011	06/12/2012 2:03PM	

Edit
Change Password
User Login History
Delete

Search Cancel

Edit- change username, password, email, activate/deactivate, and change organization

Change Password- allows the administrator to change the user's password

User Login History-View user's login history

Delete- delete the user's record

STILL HAVE QUESTIONS ABOUT THIS INFORMATION?

Contact Taura Edwards, CSBG and EAP
Program Manager, for more information. You
can reach her at (317) 234-5825 or via email
at taedwards@ihcda.in.gov .